

**METHOD AND SYSTEM FOR  
DEVELOPING TEACHING AND  
LEADERSHIP CHARACTERISTICS AND  
SKILLS**

**U.S. Patent Application Serial No.  
10/016,905**

**Filed December 14, 2001**

**Attorney Docket No. D4701-00198**

**Exhibit   D**

Katharine\_Nisbet@haygroup.com

To tlc@broadband.co.uk

cc

Subject [TLC] More Design Sketches

30/10/2000 18:13

Please respond to tlc@broadband.co.uk
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Hi Rob (Mitchell)

Attached are the sketches of the pages which make up Headteachers Styles and Competencies Investigation. They correspond to the flowcharts VEST, HT1(1) and VEST, HT1(2).

Give me a call if anything doesn't make sense.

Katharine

(See attached file: HT Investigation design sketches.xls)

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## INTRODUCTION TO ACTION PLANNING

G16a

Now that you have explored your feedback and chosen which dimensions to concentrate on you will now have the opportunity to consider what may assist you in developing further these dimensions.

When you move to the next screen you will be shown a table of your chosen priorities. You will be able to further investigate these dimensions, to understand which leadership styles would support the development of a particular dimension. You will be given suggestions to include in your action plan that will assist in adopting a style based upon your leadership styles feedback.

In addition you can explore the personal characteristics which relate to the dimension you have chosen. You will be given an explanation of the characteristic and you may choose to investigate how to develop a particular characteristic. Because behaviour change requires sustained effort and commitment it is unrealistic to try to develop more than two characteristics at any one time.



NEXT

## YOUR CHOSEN PRIORITIES

Introduction

You can hover over each cell to get some more detail about the impact of each style on the feedback.

G1a

Coercive Authoritative Affiliative Democratic Pacesetter Coaching

Clarity	Of Short-Term Value	Extremely Valuable	Not Recommended	Not Recommended	Not Recommended	Valuable
Flexibility	Not Recommended	Of Short-Term Value	Valuable	Extremely Valuable	Not Recommended	Extremely Valuable
Reward	Not Recommended	Valuable	Use with Care	Not Recommended	Not Recommended	Valuable

G16e

Of those styles which have a positive impact on your chosen dimensions, this how your raters observe you using them:

Dominant Secondary Infrequent Secondary

Which style would you like to work on - select one by clicking on the name above



This is an example of the text which needs to hover over each of the cells above

G1a

	Coercive	Authoritative	Affiliative	Democratic	Pacesetting	Coaching
Clarity	Using a Coercive Style may help you clarify roles and responsibilities in the short term, but it will not help staff understand the big picture and how they contribute to wider school goals.	Adopting an Authoritative Style will help you communicate the big picture and set the vision for the school so everyone knows how they help drive improvements.	An Affiliative approach is unlikely to create Clarity and in some cases may even obscure it further.	Using a Democratic Style will neither help clarify individual roles nor will it enable you to set out the mission for the school's future.	A Pacesetting style is not helpful when Clarity is low, as it places insufficient emphasis on explaining and testing understanding.	Adopting a Coaching Style can help staff to explore implications for the school's role in contributing to the wider community.

## AUTHORITATIVE

G16j

Your colleagues perceive you using the Authoritative Style extensively and this causes you some concern. Refresh your memory of what the Authoritative Style does and doesn't involve, referring back to the Conceptual Framework. Take time to work through what you are feeling.

Here are some actions which may help you to develop your use of the above style. You may click on any or all of the these actions and they will be saved directly into your action planner for your use later in the process.

Action 1: Text  
Action 2: Text  
Action 3: Text

If you wish to type in your own action points please click here to activate the jotter. Anything you type will be saved to the action planner.

JOTTER (saving to  
action plan)

If you do not wish to select or type in any action points at this stage, please click on the next button. However, we would like to point out how useful it is to start thinking about action planning at this stage.



NEXT

## Which Characteristics Impact on the Style you have Chosen?

You can hover over a characteristic to get a brief definition of what it means. If you would like to select a characteristics to work on, click in the box to the left of the characteristics and we will ask you some questions to identify what actions would be most useful to you.

Style:

Characteristics:

AUTHORITATIVE

Strategic thinking

Impact and Influence

Drive for Improvement

Transformational Leadership

Holding People Accountable

Challenge and Support

Understanding Others

Information Seeking



## TAKING ACTION ON STRATEGIC THINKING

J1b

Recognising relevant patterns in a complex, highly detailed environment and making sense of links and influences within and outside the school. This includes thinking creatively to solve problems or issues.

Do you want to know more about what this characteristic involves in practice and how easy it will be for you to develop?

What lies behind this? Please work look at the question below to see whether this is the reason behind the blockage. If it is, click yes and we will display a list of actions from which you can choose the ones you want to do. If it is not, then click No and another question will appear.

Show question text (changes to the next iceberg question if the answer is NO

YES NO

## STRATEGIC THINKING - TAKING ACTION

Explanation of ST at relevant iceberg level

Here are some actions which may help you to develop your Strategic Thinking. You may click on any or all of the these actions and they will be saved directly into your action planner for your use later in the process.

List of actions to be selected and saved to action planner

Action 1:  
Action 2:  
Action 3:

If you wish to type in your own action points please click here to activate the jotter.  
Anything you type will be saved to the action planner.

JOTTER (saving to  
action plan)

Return to list of  
Characteristics

**METHOD AND SYSTEM FOR  
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**Exhibit E**

Beccy\_Wallace@haygroup.com

To tlc@broadband.co.uk

cc

Subject [TLC] Background questionnaires

27/10/2000 13:40

Please respond to tlc@broadband.co.uk
--

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Here they are - please discard earlier versions (sorry about that!). Far too many subjects now, I think - we will need to pilot!

Cheers

Beccy

(See attached file: School background questionnaire.doc)(See attached file: new Create Set And Nominate Raters Text - T.doc)(See attached file: new Background Questionnaires HT and T.doc)

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1D Version drafted by Steve Lams – 6-Oct-00  
2D Version drafted by Katherine Nisbet – 17-Oct-00

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## IR10 **BACKGROUND SCHOOL QUESTIONS (For research purposes)**

Please spend a few moments to complete this short background questionnaire about your school. The information you provide will allow us to understand the data better and over time improve the service we offer you.

1. How many pupils are there in your school? [1]

[type in number of pupils]

2. What phase is your school classified as? [2]

- ☐ Nursery
- ☐ Primary

Prompt if Primary or Nursery clicked:

We have designed a questionnaire which is suitable for 'Key Stage 2' pupils with a reading age of seven and above. If you feel that some of your younger pupils are capable of completing this questionnaire, we advise that a classroom assistant or parent sits with the pupil and helps them to understand the questions and response options.

- ☐ Middle-deemed primary
- ☐ Middle-deemed secondary
- ☐ Secondary
- ☐ Special
- ☐ Other [type in phase]

3. Which year groups are there in your school? [Click as many as apply] [3a-3o]

- ☐ nursery
- ☐ reception
- ☐ year 1
- ☐ year 2
- ☐ year 3
- ☐ year 4
- ☐ year 5
- ☐ year 6

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- ☐ year 7
  - ☐ year 8
  - ☐ year 9
  - ☐ year 10
  - ☐ year 11
  - ☐ year 12
  - ☐ year 13
4. What percentage of pupils at your school receive free school meals? [4]  
[type in]%
5. What percentage of pupils at your school have English as an Additional Language? [5]  
[type in]%
6. How many teachers are there in your school? [6]  
[type in number of teachers]
7. What is your admissions policy at your school? [7]  
☐ Comprehensive  
☐ Selective  
☐ Not applicable
8. Is your school denominational? [8]  
☐ Church of England  
☐ Other denomination  
☐ Not denominational
9. Which of the following most closely describes the status of your school? [9]  
☐ Voluntary   ☐ Community   ☐ Foundation  
☐ Independent   ☐ Other
10. When was your last Ofsted inspection? [10]

1D Version drafted by Steve Lams – 6-Oct-00  
2D Version drafted by Katherine Nisbet – 17-Oct-00

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[Input month and year] or 'not applicable'

11. When is your next Ofsted inspection? [11]

[input month and year] or 'not applicable'

12. Is your school classified as any of the following: (please click as many as apply) [12]

- ☐ Beacon School
- ☐ Community Technology College
- ☐ City Academy
- ☐ Fresh Start School
- ☐ In Special Measures
- ☐ Serious Weaknesses
- ☐ Specialist School [type in]
- ☐ Other [type in]



**CREATE SETS AND NOMINATE RATERS - TEACHERS**

- CSNR1 Part of the process of using Transforming Learning involves the collection and analysis of data – both from you (the user) and from your pupils too. We do this by using on-line questionnaires which you and your pupils (your raters) fill in. Over time you can track the progress of this class – therefore, if you have decided on the class you wish to use, it is important to give this class a memorable name for future use. You will then be asked to record the names of seven pupils from that class whom you would like to involve in the process.
- CSNR2 Please enter the name of your class here (e.g. 111A or Geography Year 4):  
[NEED CONFIRMATION PROCESS ETC]

## CSNR 3 Set creation questionnaire - TEACHERS:

Please answer as many of the following questions as you can. These questions are particularly about **[enter name of class]**. All of your answers to these questions will be used for research purposes, to help us to provide a better service to you in the future. However, most of these questions will also be used for preparing your personalised feedback, so that we can make sure that your feedback is tailored to your specific circumstances as possible.

a) How long have you been teaching this class?

- ☐ less than 1 term [a1]  
☐ more than a term but less than a year [a2]  
☐ 1 year [a3]  
☐ 2 years [a4]  
☐ more than 2 years [a5]

b) Do you teach this class in a classroom?

- ☐ yes ☐ no [b]

*[if no, drop Environment dimension questions and questions 2 and 29 – leave these fields blank in the database]*

c) Do you set homework?

- ☐ yes ☐ no [c]

*[If no – drop questions 10, 23 and 25 – leave these fields blank in the dataset]*

d) Which key stages do you have in this class?  
(click on as many as apply)

- ☐ I ☐ II ☐ III ☐ IV ☐ V [d1 to d5]

e) Which year groups do you have in this class?  
(click on as many as apply)

- ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7  
☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☐ 13

[e1 to e13]

- f) What is the MAIN subject that you teach this class? (Please click only ONE answer - if you work in a primary school, please cross the "General Primary" box only) [f]

**[is it possible to show only the appropriate options here?]**

***Primary teachers:***

- ☐ General Primary (all or most subjects)
- ☐ English/literacy
- ☐ Maths/numeracy
- ☐ Pastoral
- ☐ Special Educational Needs
- ☐ Other subject

***Secondary Teachers:***

- ☐ Maths (including statistics)
- ☐ English (incl. drama)
- ☐ Welsh
- ☐ Modern Foreign Languages
- ☐ Other languages
- ☐ Physics
- ☐ Chemistry
- ☐ Biology
- ☐ Combined/integrated science
- ☐ Other science
- ☐ Information Technology
- ☐ Art, Craft and design
- ☐ Design and Technology (excluding information technology)
- ☐ Music
- ☐ RE
- ☐ Geography
- ☐ History
- ☐ Social Sciences (including sociology, economics, politics etc.)

1D Version drafted by Steve Lams - 30-Jul-07

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- ☐ Physical Education
- ☐ Special Educational Needs
- ☐ Pastoral
- ☐ Other [specify]

g) Typically, how many pupils do you have in this class? [g]

- ☐ 5 or fewer
- ☐ 6-10
- ☐ 11-15
- ☐ 16-20
- ☐ 21-25
- ☐ 26-30
- ☐ 31-35
- ☐ over 35

h) What percentage of pupils in this class have English as an Additional Language?

[enter]% [h]

*[prompt text later?]*

i) **[is it possible to show only the appropriate options here?]**

***–Sec [For Secondary Teachers only]: [i-sec]***

***Do the majority of pupils in this class have a reading age of at least 11?***

☐ Yes ☐ No

*[prompt text later?]*

***– Pri [For Primary Teachers only]: [i-pri]***

***Do the majority of pupils in this class have a reading age of at least 7?***

☐ Yes ☐ No

*[prompt text later?]*

- CSNR4 [THIS IS GOING TO CHANGE – PULLING ANSWERS TO h) and i) as well as f).]  
You have identified this class as being a Special Needs class. You need to select the type of questionnaire that you want your raters to complete. The "Secondary School" questionnaire asks for answers on a six point scale asking pupils to assess their classroom both now and in an ideal world. This questionnaire is designed for and has been tested on pupils with a reading age of 11 and above. The "Primary School" questionnaire uses a four point scale and has simpler questions focusing only on the current climate. This has been tested on pupils with a reading age of seven and above. This version can be used on pupils with a reading age of less than seven, provided a classroom assistant or parent sits with the pupils and checks they understand each question and the response options. Please select the questionnaire type you wish to use.
- CSNR5 You now need to select seven raters from your chosen class. Please enter their names and e-mail addresses in the boxes provided. Where individual e-mails are available, raters will be notified automatically with details of how to complete the questionnaires. Where no e-mail is available, please leave that field blank and use the "print" feature, which will print a sheet per rater with the relevant details that you can then pass to them.
- You will be able to change raters names and details if need be in the future.
- CSNR6 One or more of the e-mail addresses you entered does not follow a recognised format (i.e. name@place.ext). Please check the e-mail addresses and amend as necessary. Remember you can delete the e-mail address and default to printing the information and distribute it manually.
- CSNR7 [Same as CSNR\_HT7]
- CSNR8 [Same as CSNR\_HT8]
- CSNR9 [Same as CSNR\_HT9]
- CSNR10 Would you like to create another class profile?
- CSNR11 You need to nominate a full set of seven raters. Please go back and enter more rater names.

CSNR 12 You are not allowed to set-up another class at this point in time. Are you trying to edit your existing class information?

CSNR13 Click on the print button to create a print-out for each rater.

## Background Questionnaires HT &amp; T

BQ1 Headteacher intro

B16b Headteacher Aspirations questions

## BQ2 HEADTEACHER BACKGROUND QUESTIONS

1. Please enter your full name: [ ] [1]
2. Please enter your title (Mr/Ms/Dr etc.) [ ] [2]
3. Your age: [3]  
☐ 18-25    ☐ 26-30    ☐ 31-35  
☐ 36-45    ☐ 46-55    ☐ 56-65    ☐ Over 65
4. Are you?    ☐ Male    ☐ Female [4]
5. Have you been a participant on: [5]  
☐ LPSH  
☐ NPQH  
☐ Neither
6. For how many years have you been a headteacher (in any school)? [6]  
☐ less than 1    ☐ 1-2    ☐ 3-5  
☐ 6-10    ☐ 10-20    ☐ more than 20
7. For how many years have you been a headteacher in your CURRENT school? [7]  
☐ less than 1    ☐ 1-2    ☐ 3-5  
☐ 6-10    ☐ 10-20    ☐ more than 20
8. For how many years have you been in teaching? [8]  
☐ less than 1    ☐ 1-2    ☐ 3-4  
☐ 5-7    ☐ 8-10    ☐ 10-20

☐ more than 20

9. What percentage of your time is spent teaching? [9]

[type in]%

10. How many O-levels / GCSEs or equivalents do you have? [10]

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9

☐ 10 or more

11. How many A-levels or equivalents do you have?

☐ 1 ☐ 2 ☐ 3 ☐ 4 or more [11]

12. Do you have a degree in a subject other than education? [12]

☐ Yes, Honours

☐ Yes, but not Honours

☐ No

13. Do you have a formal teaching qualification? [13]

☐ BEd ☐ Cert.Ed ☐ PGCE ☐ Other

☐ No

14. How would you describe your ethnic origin? [14]

☐ Afro-Caribbean ☐ Asian ☐ Caucasian

☐ Oriental ☐ Other



BQ3

**Teacher Intro**

Bk2

Teacher Aspirations questions

BQ4

Teacher background questions

[NEED SOME EXPLANATORY TEXT HERE]

1. Please enter your full name: [ ] [1]
2. Please enter your title (Mr/Ms/Dr etc.) [ ] [2]
3. Your age: [3]
 

<input type="checkbox"/> 18-25	<input type="checkbox"/> 26-30	<input type="checkbox"/> 31-35	<input type="checkbox"/> 36-45
<input type="checkbox"/> 46-55	<input type="checkbox"/> 56-65	<input type="checkbox"/> over 65	
4. Are you? ☐ Male ☐ Female [4]
5. Which key stages do you teach? (cross as many as apply) [5a to 5e]
 

<input type="checkbox"/> I	<input type="checkbox"/> II	<input type="checkbox"/> III	<input type="checkbox"/> IV	<input type="checkbox"/> V
----------------------------	-----------------------------	------------------------------	-----------------------------	----------------------------
6. Which year groups do you teach? (cross as many as apply) [6a to 6m]
 

<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10
<input type="checkbox"/> 11	<input type="checkbox"/> 12	<input type="checkbox"/> 13		
7. What subject do you MAINLY? (Please click only one - if you work in a primary school, please cross the "General Primary" box only) [7]

**[is it possible to show only the appropriate options here?]**

***Primary teachers:***

- ☐ General Primary (all or most subjects)
- ☐ English/literacy

- ☐ Maths/numeracy
- ☐ Pastoral
- ☐ Special Educational Needs
- ☐ Other subject

***Secondary Teachers:***

- ☐ Maths (including statistics)
- ☐ English (incl. drama)
- ☐ Welsh
- ☐ Modern Foreign Languages
- ☐ Other languages
- ☐ Physics
- ☐ Chemistry
- ☐ Biology
- ☐ Combined/integrated science
- ☐ Other science
- ☐ Information Technology
- ☐ Art, Craft and design
- ☐ Design and Technology (excluding information technology)
- ☐ Music
- ☐ RE
- ☐ Geography
- ☐ History
- ☐ Social Sciences (including sociology, economics, politics etc.)
- ☐ Physical Education
- ☐ Special Educational Needs
- ☐ Pastoral
- ☐ Other [specify]

8. What is your typical class size?

[8]

- ☐ 5 or fewer

- ☐ 6-10
- ☐ 11-15
- ☐ 16-20
- ☐ 21-25
- ☐ 26-30
- ☐ 31-35
- ☐ over 35

9. What responsibilities in addition to classroom teaching do you hold (please click only the most senior responsibility you hold)? [9]

- ☐ Class tutor
  - ☐ Head of Year
  - ☐ Head of upper school/lower school etc.
  - ☐ Other pastoral role
  - ☐ SENCO
  - ☐ Curriculum coordinator
  - ☐ Second in department
  - ☐ Head of department
  - ☐ Member of SMT
  - ☐ Other (please specify):
- 
- 

10. For how many years have you been a teacher? [10]

- ☐ less than 1
- ☐ 1-2
- ☐ 3-4
- ☐ 5-7
- ☐ 8-10
- ☐ 10-20
- ☐ more than 20

11. For how many years have you been teaching in your current school? [11]

- ☐ less than 1                      ☐ 1-2                      ☐ 3-5  
☐ 6-10                      ☐ 11-20  
☐ more than 20

12. How many O-levels / GCSEs or equivalents do you have? [12]

- ☐ 1                      ☐ 2                      ☐ 3                      ☐ 4                      ☐ 5  
☐ 6                      ☐ 7                      ☐ 8                      ☐ 9  
☐ 10 or more

13. How many A-levels or equivalents do you have?

- ☐ 1                      ☐ 2                      ☐ 3                      [13]  
☐ 4 or more

14. Do you have a degree in a subject other than education? [14]

- ☐ Yes, Honours  
☐ Yes, but not Honours  
☐ No

15. If you have a degree, is it in the main subject you currently teach (or in a closely related subject)? [15]

- ☐ Yes                      ☐ No

16. Do you have a formal teaching qualification? [16]

- ☐ BEd                      ☐ Cert.Ed                      ☐ PGCE                      ☐ Other  
☐ No

17. How would you describe your ethnic origin? [17]

- ☐ Afro-Caribbean                      ☐ Asian  
☐ Caucasian                      ☐ Oriental  
☐ Other

18. On which pay scale are you paid? [18]

☐ Pre-threshold

☐ Post-Threshold

☐ AST (Advanced Skills Teacher)

☐ Senior Teacher (Including Heads' and Deputies'  
scale)

☐ Other

BQ5      Static: thank you and move on

**METHOD AND SYSTEM FOR  
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LEADERSHIP CHARACTERISTICS AND  
SKILLS**

**U.S. Patent Application Serial No.  
10/016,905**

**Filed December 14, 2001**

**Attorney Docket No. D4701-00198**

**Exhibit F**

Beccy\_Wallace@haygroup.com

To tlc@broadband.co.uk

cc

Subject [TLC] Text selection algorithms...

24/10/2000 16:41

Please respond to tlc@broadband.co.uk
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Well folks, here is my first bash at the text selection algorithms for the feedback charts (the sketches I sent over earlier might be helpful too...).

Any comments welcome, of course!

(Wee message to Rob Mitchell - you might find the descriptions in the algorithms helpful for understanding how the charts will work.)

Bye then

Beccy

(See attached file: Feedback Text Selection Algo specs.doc)

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## HF2a

### Gap and absolute levels text algorithm - climate dimensions

Flow diagram ref: **FEED HT1 (1)**

<b>Owned by:</b>	SL	<b>Status:</b> (Discussed, Dummy, D1, D2, QA, BB, XPT)	<b>Discussed</b>
<b>Category:</b>	Feedback	<b>Date:</b>	<b>D1</b>
<b>Deadline:</b>	15-Oct		<b>21/10/00</b>
<b>Authorship team:</b>	BW	<b>Challenge:</b>	B
<b>Notes:</b>	<p>This has been greatly simplified – a ‘text selection matrix’ may not be required, but rather just a text matrix</p> <p>Xa to Xr (x6), Xw to Xz (x6) and (i) to (x) are items of text, to be defined (need to be amendable in future) – making up text matrix C1f</p> <p>DO WE NEED TO INTRODUCE A FIFTH ‘CHART’ TO THE FLOW DIAGRAMS – THE FOCUS CHART?</p>	<b>Type: Text Selection for charts</b>	
		<b>Time 2:</b>	FEED HT2 (1)

**Text selection algorithm serves four different charts (we are calling these ‘chart elements’), and summary information, in the following order:**

- AS-IS                - comparison of self actual and ideal scores
- AS-AR             - comparison of self and average rater actual scores
- AR-IR             - comparison of average rater actual and ideal scores
- AR-norms        - comparison of average rater scores with norm scores
- Summary information

The charts build up, one element at a time, until data for all four charts are shown on the same screen. As each chart element appears, any previously shown elements fade into the background, and, on the same screen, a single item of text is shown for the current element of the chart (selected using gap markers and data markers, as appropriate, as shown below). An individual brings up the next chart element by choosing the next button. It is envisaged that the intro text to each chart (shown as a separate item on the flow diagrams) may also be shown on the same screen as the charts (somewhere at the top of the screen).

Finally, when the user chooses the 'next' button from the fourth element, all four chart elements stay on the screen, but this time a particular element of the chart is highlighted as the area for focus (other elements fade into the background). There is also a piece of summary text that describes the area on which an individual should focus their efforts – this area for focus and hence the summary text and chart element for highlighting is selected based on the pattern of scores across the four chart elements. In addition to the summary text, all four items of text (for each chart element) re-appear together on the final chart screen, with a highlight/arrow (or something) indicating the item for focus. Also on the same screen, there will be some static text describing the move to the next dimension or the move to the next activity if this is the last dimension.

**All text selections are per dimension:**

**Different text will be shown for each dimension.**

**The following describes dimension X**

**(therefore, there are 6 items of text for each condition listed below – one for each of the six dimensions)**

***AS-IS text based on AS-IS gap marker (derived by algo HQ23):***

If gap marker = blank, then blank

Else If gap marker = 1, then show text [Xa]

Else If gap marker = 2, then show text [Xb]

Else If gap marker = (3, 4 or 5), then show text [Xc]

Else If gap marker = 6, then show text [Xd]

Else show text [Xe]

***AS-AR text based on AS-AR gap marker (derived by algo HQ25):***

Two pieces of text shown – one on dimension as a whole and one on sub-dimension driver. Sub-dimensions are flagged as drivers (or not) in HQ25 – data drawn on here. If there is no driver for a given dimension, no additional text is shown.

*For dimension as a whole:*

If gap marker = blank, then blank

Else If gap marker = 1, then show text [Xf]

Else If gap marker = 2, then show text [Xg]

Else If gap marker = (3, 4 or 5), then show text [Xh]

Else If gap marker = 6, then show text [Xi]

Else show text [Xj]

*For sub-dimension driver – only for the five dimensions with sub-dimension driver calculated (ie. not team commitment - see algo HQ25) – this text appears as a separate sentence below first piece of text:*

If dimension is valid, then...

If dimension is 'Flexibility' and 'Bureaucracy Minimised' is driver, then show text (i)

Else if dimension is 'Flexibility' and 'Innovation' is driver, then show text (ii)

Else if dimension is 'Responsibility' and 'Autonomy' is driver, then show text (iii)

Else if dimension is 'Responsibility' and 'Risk Taking' is driver, then show text (iv)

Else if dimension is 'Standards' and 'Improvement' is driver, then show text (v)

Else if dimension is 'Standards' and 'Excellence' is driver, then show text (vi)

Else if dimension is 'Rewards' and 'Performance Based Rewards' is driver,  
then show text (vii)

Else if dimension is 'Rewards' and 'Recognition' is driver, then show text (viii)  
 Else if dimension is 'Clarity' and 'Mission and Direction' is driver, then show text (ix)  
 Else if dimension is 'Clarity' and 'Organisation and Expectations' is driver,  
     then show text (x)  
 Else if dimension is 'Team Commitment', then show no extra text

***AR-IR text based on AR-IR gap marker (derived by algo HQ24):***

If gap marker = blank, then blank  
 Else If gap marker = 1, then show text [Xk]  
 Else If gap marker = 2, then show text [Xl]  
 Else If gap marker = (3, 4 or 5), then show text [Xm]  
 Else If gap marker = 6, then show text [Xn]  
 Else text [Xo]

***AR-norms text based on AR-norms data marker (derived by algo HQ22):***

If data marker = blank, then show blank  
 Else If data marker = 1, then show text [Xp]  
 Else If data marker = 2, then show text [Xq]  
 Else show text [Xr]

***Summary text***

If AS-AR gap marker  $\neq$  (3, 4, 5 or 6), then AS-AR gap is area for focus  
     and show summary text [Xw] and highlight AS-AR text/chart  
 Else if AR-IR gap marker  $\neq$  (3, 4, or 5), then AR-IR gap is area for focus  
     and show summary text [Xx] and highlight AR-IR text/chart  
 Else if AR-norms marker = (1 or 2), then AR-norms comparison is area for focus  
     and show text [Xy] and highlight AR-norms text/chart  
 Else user is a super dooper whizz kid, mate,  
     and show text [Xz] and highlight AR-norms text/chart

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## HF2b

### Gap and absolute level text algorithm - overall climate

Flow diagram ref: **FEED HT1 (1)**

<b>Owned by:</b>	SL	<b>Status:</b> (Discussed, Dummy, D1, D2, QA, BB, XPT)	<b>Discussed</b>
<b>Category:</b>	Feedback	<b>Date:</b>	<b>D1</b>
<b>Deadline:</b>	15-Oct		<b>21/10/00</b>
<b>Authorship team:</b>	BW	<b>Challenge:</b>	B
<b>Notes:</b>	[a], [b] and [c] are parameters to be defined following norm dataset analysis  A to J are pieces of text (making up text matrix C7d)	<b>Type:</b>	Text Selection for charts
		<b>Time 2:</b>	FEED HT2 (1)

This text selection algorithm serves two separate charts that appear on separate screens and each shows all dimensions together:

- SA-RA            - self actual-rater actual gaps (modulus thereof!)
- RA-norms       - all RA data with zig-zag norm lines behind

Each chart may have displayed with it the intro text (shown as a different element on the flowchart) and will have displayed with it the text selected by this algorithm.

#### ***SA-RA chart***

*The text is selected using an average of the modulus of the SA-RA gap and RA-RI gap scores for all dimensions (ie. always positive). If (and only if) there is no significant SA-RA gap (overall average is less than [a]), then text for overall RA-RI gap is induced:*

#### Calculating the overall averages:

'Overall Average Modulus SA-RA gap' = average (|SA-RA scores for each dimension|)

'Overall Average Modulus RA-RI gap' = average (|RA-RI scores for each dimension|)

(where missing data/invalid dimensions = blank, not zero)

#### Selecting the text ( $X$ = number of valid dimensions):

If 'Overall Average Modulus SA-RA gap' < [a],

(then show text A

AND If 'Overall Average Modulus RA-RI gap' < [c], then show text D

Else If (>(X/2) RA-RI gaps) are negative, then show text E

Else show text F)

Else if 'Overall Average Modulus SA-RA gap'  $\geq$  [b] then show text C

Else show text B

### ***AR-norms chart***

*Text is selected based on the pattern of AR-norm results across all the dimensions:*

*Looking at all valid dimensions:*

If CSI AR-norm data marker (derived in HQ22) = Low [= 1] for **all** dimensions,  
then show text G

Else if CSI AR-norm data marker (derived in HQ22) = Medium [= 2] for **all** dimensions,  
then show text H

Else if CSI AR-norm data marker (derived in HQ22) = High [= 3] for **all** dimensions,  
then show text I

Else show text J

[or other combinations? Such as none low/none high?]

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## TF2a

### Secondary teachers Gap and Absolute Level Text Algo - per dimension (2)

Flow diagram ref: **FEED ST1**

<b>Owned by:</b>	SL	<b>Status:</b> (Discussed, Dummy, D1, D2, QA, BB, XPT)	<b>Discussed</b>
<b>Category:</b>	Feedback	<b>Date:</b>	<b>D1</b>
<b>Deadline:</b>	15-Oct		<b>21/10/00</b>
<b>Authorship team:</b>	BW	<b>Challenge:</b>	B
<b>Notes:</b>	<p><b>THIS IS CURRENTLY IDENTICAL IN STRUCTURE TO THE FIRST PART OF HF2a (but draws off different dimensions, obviously)</b></p> <p><b>Xa to Xr and Xw to Xz are items of text (x9), to be defined (need to be amendable in future) in text matrix Ca6 – these are different from the text items in HF2a</b></p> <p><b>This has been greatly simplified – a ‘text selection matrix’ may not be required, but rather just a text matrix</b></p> <p><b>DO WE NEED TO INTRODUCE A FIFTH ‘CHART’ TO THE FLOW DIAGRAMS – THE FOCUS CHART?</b></p>	<b>Type: Text Selection for charts</b>	
		<b>Time 2:</b>	FEED ST2

**Text selection algorithm serves four different charts (we are calling these ‘chart elements’), and summary information, in the following order:**

- AS-IS                      - comparison of self actual and ideal scores
- AS-AR                    - comparison of self and average rater actual scores
- AR-IR                    - comparison of average rater actual and ideal scores
- AR-norms               - comparison of average rater scores with norm scores
- Summary information

The charts build up, one element at a time, until data for all four charts are shown on the same screen. As each chart element appears, any previously shown elements fade into the background, and, on the same screen, a single item of text is shown for the current element of the chart (selected using gap markers and data markers, as appropriate, as shown below). An individual brings up the next chart element by choosing the next

button. It is envisaged that the intro text to each chart (shown as a separate item on the flow diagrams) may also be shown on the same screen as the charts (somewhere at the top of the screen).

Finally, when the user chooses the 'next' button from the fourth element, all four chart elements stay on the screen, but this time a particular element of the chart is highlighted as the area for focus (other elements fade into the background). There is also a piece of summary text that describes the area on which an individual should focus their efforts – this area for focus and hence the summary text and chart element for highlighting is selected based on the pattern of scores across the four chart elements. In addition to the summary text, all four items of text (for each chart element) re-appear together on the final chart screen, with a highlight/arrow (or something) indicating the item for focus. Also on the same screen, there will be some static text describing the move to the next dimension or the move to the next activity if this is the last dimension.

**All text selections are per dimension:**

**Different text will be shown for each dimension.**

**The following describes dimension X**

**(therefore, there are 9 items of text for each condition listed below – one for each of the nine dimensions)**

***AS-IS text based on AS-IS gap marker (derived by algo STQ11):***

If gap marker = blank, then blank  
 Else If gap marker = 1, then show text [Xa]  
 Else If gap marker = 2, then show text [Xb]  
 Else If gap marker = (3, 4 or 5), then show text [Xc]  
 Else If gap marker = 6, then show text [Xd]  
 Else show text [Xe]

***AS-AR text based on AS-AR gap marker (derived by algo STQ13):***

If gap marker = blank, then blank  
 Else If gap marker = 1, then show text [Xf]  
 Else If gap marker = 2, then show text [Xg]  
 Else If gap marker = (3, 4 or 5), then show text [Xh]  
 Else If gap marker = 6, then show text [Xi]  
 Else show text [Xj]

***AR-IR text based on AR-IR gap marker (derived by algo STQ12):***

If gap marker = blank, then blank  
 Else If gap marker = 1, then show text [Xk]  
 Else If gap marker = 2, then show text [Xl]  
 Else If gap marker = (3, 4 or 5), then show text [Xm]  
 Else If gap marker = 6, then show text [Xn]  
 Else text [Xo]

***AR-norms text based on AR-norms data marker (derived by algo STQ10):***

If data marker = blank, then show blank  
 Else If data marker = 1, then show text [Xp]  
 Else If data marker = 2, then show text [Xq]  
 Else show text [Xr]

**Summary text**

If AS-AR gap marker  $\neq$  (3, 4, 5 or 6), then AS-AR gap is area for focus  
and show summary text [Xw] and highlight AS-AR text/chart  
Else if AR-IR gap marker  $\neq$  (3, 4, or 5), then AR-IR gap is area for focus  
and show summary text [Xx] and highlight AR-IR text/chart  
Else if AR-norms marker = (1 or 2), then AR-norms comparison is area for focus  
and show text [Xy] and highlight AR-norms text/chart  
Else user is a super dooper whizz kid, mate,  
and show text [Xz] and highlight AR-norms text/chart



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## TF2b

### Secondary teachers Gap and absolute levels Text Algo - across dimensions (2)

Flow diagram ref: **FEED ST1**

<b>Owned by:</b>	SL	<b>Status:</b> (Discussed, Dummy, D1, D2, QA, BB, XPT)	<b>Discussed</b>
<b>Category:</b>	Feedback	<b>Date:</b>	<b>D1</b>
<b>Deadline:</b>	15-Oct		<b>21/10/00</b>
<b>Authorship team:</b>	BW	<b>Challenge:</b>	B
<b>Notes:</b>	(This is identical in structure to HF2b, but draws off different dimensions)  [a], [b] and [c] are parameters to be defined following norm dataset analysis  A to J are pieces of text (making up text matrix Cj4)	<b>Type: Text Selection for charts</b>	
		<b>Time 2:</b>	FEED ST2

This text selection algorithm serves two separate charts that appear on separate screens and each shows all dimensions together:

- SA-RA            - self actual-rater actual gaps (modulus thereof!)
- RA-norms       - all RA data with zig-zag norm lines behind

Each chart may have displayed with it the intro text (shown as a different element on the flowchart) and will have displayed with it the text selected by this algorithm.

#### ***SA-RA chart***

*The text is selected using an average of the modulus of the SA-RA gap and RA-RI gap scores for all dimensions (ie. always positive). If (and only if) there is no significant SA-RA gap (overall average is less than [a]), then text for overall RA-RI gap is induced:*

#### Calculating the overall averages:

'Overall Average Modulus SA-RA gap' = average (|SA-RA scores for each dimension|)

'Overall Average Modulus RA-RI gap' = average (|RA-RI scores for each dimension|)  
(where missing data/invalid dimensions = blank, not zero)

#### Selecting the text (X = number of valid dimensions):

If 'Overall Average Modulus SA-RA gap' < [a],

(then show text A  
 AND If 'Overall Average Modulus RA-RI gap' < [c], then show text D  
     Else If ( $>(X/2)$  RA-RI gaps) are negative, then show text E  
     Else If 'Overall Average RA-RI gap'  $\geq 0$ , then show text E  
     Else show text F)  
 Else if 'Overall Average SA-RA gap'  $\geq [b]$  then show text C  
 Else show text B

### ***AR-norms chart***

*Text is selected based on the pattern of AR-norm results across all the dimensions:*

*Looking at all valid dimensions:*

If CSI AR-norm data marker (derived in HQ22) = Low [= 1] for **all** dimensions,  
     then show text G  
 Else if CSI AR-norm data marker (derived in HQ22) = Medium [= 2] for **all** dimensions,  
     then show text H  
 Else if CSI AR-norm data marker (derived in HQ22) = High [= 3] for **all** dimensions,  
     then show text I  
 Else show text J  
 [or other combinations? Such as none low/none high?]

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## TF13a

### Primary teachers gap and absolute level Text Algo - per dimension (2)

Flow diagram ref: **FEED PT1**

<b>Owned by:</b>	SL	<b>Status:</b> (Discussed, Dummy, D1, D2, QA, BB, XPT)	<b>Discussed</b>
<b>Category:</b>	Feedback	<b>Date:</b>	<b>D1</b>
<b>Deadline:</b>	15-Oct		<b>21/10/00</b>
<b>Authorship team:</b>	BW	<b>Challenge:</b>	B
<b>Notes:</b>	<p>This has been greatly simplified – a ‘text selection matrix’ may not be required, but rather just a text matrix</p> <p>Xf to Xj, Xp to Xr and Xw, Xy and Xz are items of text (x9), to be defined in text matrix Ca19 (need to be amendable in future) – [perhaps the same as TF2a/text matrix Ca6 items?]</p> <p>DO WE NEED TO INTRODUCE A FOURTH ‘CHART’ TO THE FLOW DIAGRAMS – THE FOCUS CHART (WE KNOW WE NEED TO INTRODUCE A THIRD – THE ‘AS’ CHART IS CURRENTLY NOT INCLUDED)?</p>	<b>Type:</b>	Text Selection for charts
		<b>Time 2:</b>	FEED PT2

**Text selection algorithm serves two of three different charts (which we are calling ‘chart elements’) and summary information, in the following order:**

- AS-AR            - comparison of self and average rater scores
- AR-norms      - comparison of average rater scores with norm scores
- Summary information

The AS chart, which is shown first, has static text associated with it (therefore three chart elements all together, *requiring amendment in flowcharts which only shows two*) – so there are three charts elements all together.

The charts build up, one element at a time (AS data and static text first), until data for all three chart elements are shown on the same screen. As each chart element appears, any previously shown elements fade into the background, and, on the same screen, a single item of text is shown for the current element of the chart (selected using gap markers and

data markers, as appropriate, as shown below). An individual brings up the next chart element by choosing the next button. It is envisaged that the intro text to each chart (shown as a separate item on the flow diagrams) may also be shown on the same screen as the charts (somewhere at the top of the screen).

Finally, when the user chooses the 'next' button from the AR-norms chart, the all three chart elements stay on the screen, but this time a particular element of the chart is highlighted as the area for focus (other elements fade into the background). There is also a piece of summary text that describes the area on which an individual should focus their efforts – this area for focus and hence the summary text and chart element for highlighting is selected based on the pattern of scores across the four chart elements. In addition to the summary text, the two items of text (for AS-AR and AR-norms chart elements) re-appear together on the final chart screen, with a highlight/arrow (or something) indicating the item for focus. Also on the same screen, there will be some static text describing the move to the next dimension or the move to the next activity if this is the last dimension.

**All text selections are per dimension:**

**Different text will be shown for each dimension.**

**The following describes dimension X**

**(therefore, there are 9 items of text for each condition listed below – one for each of the nine dimensions)**

***AS-AR text based on AS-AR gap marker (derived by algo PTQ8):***

If gap marker = blank, then blank

Else If gap marker = 1, then show text [Xf]

Else If gap marker = 2, then show text [Xg]

Else If gap marker = (3, 4 or 5), then show text [Xh]

Else If gap marker = 6, then show text [Xi]

Else show text [Xj]

***AR-norms text based on AR-norms data marker (derived by algo PTQ7):***

If data marker = blank, then show blank

Else If data marker = 1, then show text [Xp]

Else If data marker = 2, then show text [Xq]

Else show text [Xr]

**Summary text**

If AS-AR gap marker  $\neq$  (3, 4, 5 or 6), then AS-AR gap is area for focus  
and show summary text [Xw] and highlight AS-AR text/chart

Else if AR-norms marker = (1 or 2), then AR-norms comparison is area for focus  
and show text [Xy] and highlight AR-norms text/chart

Else user is a super dooper whizz kid, mate,  
and show text [Xz] and highlight AR-norms text/chart

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Algorithm/Chart/Table Summary Document**

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## TF13b

### Primary teachers gap and absolute level Text Algo - across dimensions (2)

Flow diagram ref: **FEED PT1**

<b>Owned by:</b>	SL	<b>Status:</b> (Discussed, Dummy, D1, D2, QA, BB, XPT)	<b>Discussed</b>
<b>Category:</b>	Feedback	<b>Date:</b>	<b>D1</b>
<b>Deadline:</b>	15-Oct		<b>21/10/00</b>
<b>Authorship team:</b>	BW	<b>Challenge:</b>	B
<b>Notes:</b>	<p>[a] and [b] are parameters to be defined following norm dataset analysis (not the same as [a] and [b] in TF2b)</p> <p>A to J are pieces of text (making up text matrix Cj4 – same for primary and secondary)</p>	<b>Type: Text Selection for charts</b>	
		<b>Time 2:</b>	FEED PT2

**This text selection algorithm serves two separate charts that appear on separate screens and each shows all dimensions together:**

- SA-RA            - self actual–rater actual gaps (modulus thereof!)
- RA-norms      - all RA data with zig-zag norm lines behind

Each chart may have displayed with it the intro text (shown as a different element on the flowchart) and will have displayed with it the text selected by this algorithm.

#### ***SA-RA chart***

*The text is selected using an average of the modulus of the SA-RA gap scores for all dimensions (ie. always positive).*

#### **Calculating the Overall Average:**

‘Overall Average SA-RA gap’ = average (|SA-RA scores for each dimension|)  
(where missing data/invalid dimensions = blank, not zero)

Selecting the text:

If 'Overall Average SA-RA gap' < [a],  
     then show text A

Else if 'Overall Average SA-RA gap' ≥ [b] then show text C

Else show text B

***AR-norms chart***

*Text is selected based on the pattern of AR-norm results across all the dimensions:*

*Looking at all valid dimensions:*

If CSI AR-norm data marker (derived in HQ22) = Low [= 1] for **all** dimensions,  
     then show text G

Else if CSI AR-norm data marker (derived in HQ22) = Medium [= 2] for **all** dimensions,  
     then show text H

Else if CSI AR-norm data marker (derived in HQ22) = High [= 3] for **all** dimensions,  
     then show text I

Else show text J

[or other combinations? Such as none low/none high?]